

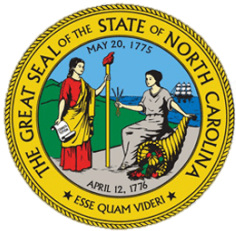
# **North Carolina COVID-19 Vaccine Management System (CVMS) Provider Portal**

## **Step 9 - Invite recipients to self-schedule their appointments (optional)**

### **User Guide**

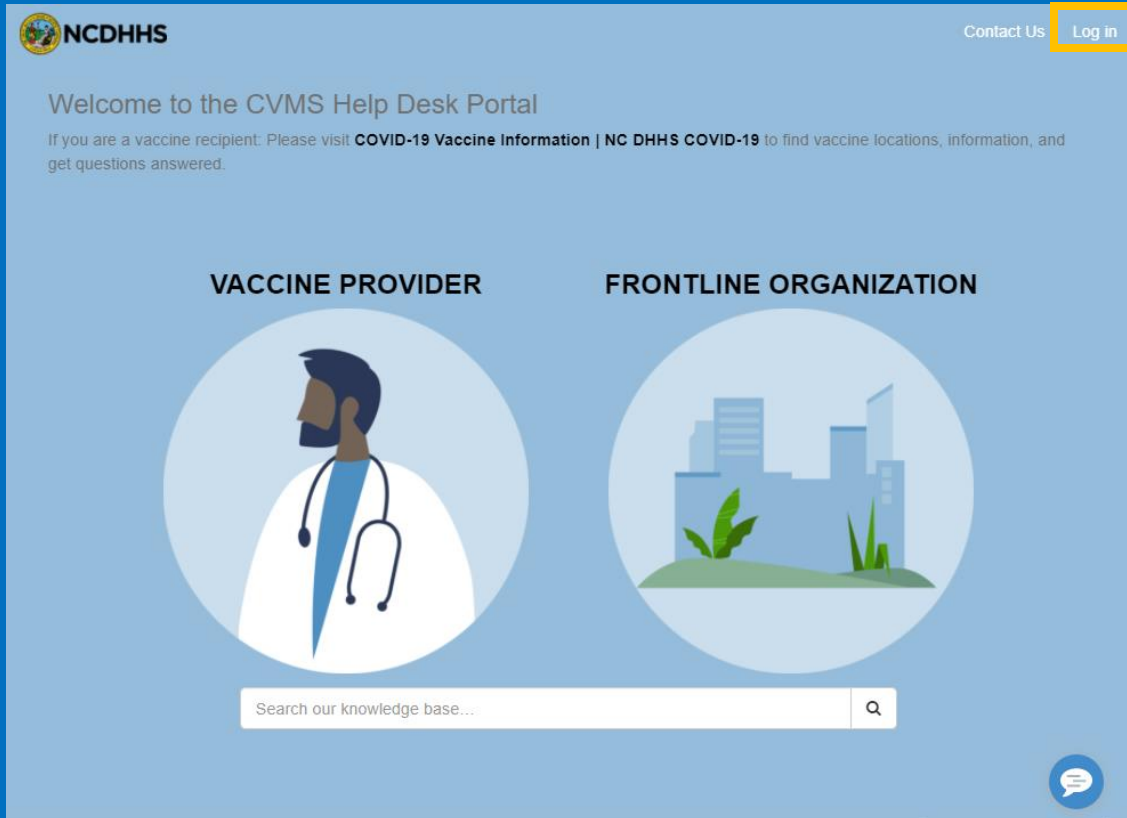
Version 11

September 20, 2021



NC DEPARTMENT OF  
**HEALTH AND  
HUMAN SERVICES**





If you have any questions, issues or requests, please go to the CVMS Help Desk Portal\* at

[https://ncgov.servicenowservices.com/csm\\_vaccine](https://ncgov.servicenowservices.com/csm_vaccine)

You can also call the COVID-19 Vaccine Provider Help Desk at **(877) 873-6247** and select option 1.

The COVID-19 Vaccine Provider Help Desk is available during the following hours:

Monday to Friday: 7 am – 7 pm ET

Saturday: 8 am – 4 pm ET

Sunday: Closed

\* On the home page of the CVMS Help Desk Portal, select **Log in** at the top right-hand corner, then select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

1. Register for an account by clicking '**Log in**' then '**Register**' on the left side of the screen
2. Populate your first name, last name, and business e-mail
3. You will receive an e-mail with your username and temporary password to log into the portal

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# Overview

# Overview

**Vaccines.gov** Home Find Vaccines Español CDC

Need help finding a vaccine in the U.S.? Call 1-800-232-0233 (TTY 888-720-7489)

← Back to Search

**We found 50 Providers**

Powered by **VaccineFinder**

Showing results for **Moderna (age 18+), Pfizer-BioNTech (age 12+) and Johnson & Johnson/Janssen (age 18+)** near **27577** within **25 miles**

Vaccine availability is subject to change. Appointments are required at most locations. Click a location with vaccine "In stock" to take the next step.

1. [Horizon Family Medicine Smithfield](#)

**Select a date & time**

2110 Blue Ridge Rd, Raleigh, North Carolina 27607 [Change](#)

**1 Appointment 1**  
Choose a date and time

March 2021

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-----|-----|-----|
|     | 1   | 2   | 3   | 4   | 5   | 6   |
| 7   | 8   | 9   | 10  | 11  | 12  | 13  |
| 14  | 15  | 16  | 17  | 18  | 19  | 20  |
| 21  | 22  | 23  | 24  | 25  | 26  | 27  |
| 28  | 29  | 30  | 31  |     |     |     |

7 appointments available  
For Thursday March 11, 2021

|        |        |        |
|--------|--------|--------|
| 1:00pm | 2:00pm | 3:00pm |
| 4:00pm | 5:00pm | 6:00pm |
| 7:00pm |        |        |

[Continue](#)

[Back](#)

The scheduling feature in CVMS is optional and free to use for providers. It will allow your location(s) to release a certain number of appointment slots to the general public. People will be able to self-schedule their first appointment for a COVID-19 vaccine and complete their registration in CVMS before their 1<sup>st</sup> dose appointment. You will then be able to schedule their 2<sup>nd</sup> dose appointment the day of their 1<sup>st</sup> dose appointment. And later, recipients will be able to self-schedule an additional dose/booster appointment.

Note that these **appointments slots will be made available to the general public**. Therefore, this feature will NOT fit your needs if you vaccinate only a selected group of recipients (e.g., long-term care facility residents, prisoners).

In this user guide, we will review how to activate and use the scheduling feature in CVMS. You will be able to:

- Activate the scheduling feature in CVMS
- Publish appointments on the Vaccine Site Locator website <https://vaccines.gov>

The processes included in this user guide are for users with the **Healthcare Location Manager profile only**.

*Additionally, you will need to:*

- Use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers
- Log into the CVMS Provider Portal at <https://covid-vaccine-provider-portal.ncdhhs.gov> with your NCID username and password

**Now, let's get started!**

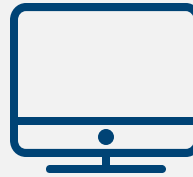
# Appointment Scheduling Overview

The Appointment Scheduling process enables Healthcare Location Managers to adjust schedule availability and publish public-facing appointment slots on the CDC's Vaccines.gov website.



1

Enable scheduling for your account in the CVMS Provider Portal.



2

Once enabled, you can set up the scheduling feature for your location(s) in the CVMS Provider Portal and allow recipients to self-schedule their first-dose and additional dose/booster appointments.



3

Set your weekly availability for recipients to book appointments.

Update the number of first-dose or additional dose/booster appointments made available to recipients as needed.

# CVMS Scheduling Key Terms

## Appointments Per Time Window

The number of concurrent appointments this location can complete per stated time window duration. Keep in mind the number of clinicians available at the time.

## Start Date

First day the location will show available appointment slots.

## Closing Date

Last day the location will show available appointment slots on the Vaccine Site Locator website.

## Vaccine Supply

The Vaccine (Appointment) Supply record is the number of appointments that are made available.

## Current Stock

The total number of appointments your location will offer to recipients. This should match the number of doses to cover all existing and future appointments. If no stock remains, location won't display available slots.

## Date of Stock Count

Date of creation of the Vaccine Supply Record. Once created, **do not edit this date.**

## Dose Number

Indicates whether the dose administered is the 1<sup>st</sup> dose, 2<sup>nd</sup> dose, or an additional dose/booster.

# **Initial Setup of the Scheduling Feature in CVMS**



# Enable the Scheduling Feature


# Step 1 of 5: Navigate to the Locations Tab

Providers can opt-in to using the scheduling feature in CVMS.

- 1. Click on the **LOCATIONS** tab

## Audience

Healthcare  
Location  
Manager



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

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You are currently logged in as Solutions Loc1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

| TIME | DETAILS | CASE NUMBER | LOCATION |
|------|---------|-------------|----------|
|------|---------|-------------|----------|

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name


Date Of Birth

# Step 2 of 5: Begin to Enable Scheduling

1. Click the **ENABLE SCHEDULING** button

Audience

Healthcare  
Location  
Manager



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Filter by Name

Filter by Address

Filter by Start Date

Filter by Closing Date

New

Enable Scheduling

| Location Name                                      | Account                 | Address  | Start Date | Closing Date |
|--|-------------------------|--|------------|--------------|
| Pop-up vaccination site 1 - Regiontest             | DoNotUse - NotRealLoc 1 | 123 Main St, Testcity, North Carolina 08619                  |            |              |
| Pop-up Vaccination site 2 - DoNotUse-NotRealLoc-SS | DoNotUse - NotRealLoc 1 | 320 Vax Way, Vik, Iceland, North Carolina 12345 111-111-1111 |            |              |
| Primary Vaccination Site _ TEST1                   | DoNotUse - NotRealLoc 1 | 56, chg, North Carolina 3568900 112-233-4455                 |            |              |
| Pop-up vaccination site 3 - TestBAPhoneNumber      | DoNotUse - NotRealLoc 1 | asdasd, adasdas, North Carolina 10102 969-685-7200           |            |              |
| Pop-up vaccination 4 - Test Gelocation R10         | DoNotUse - NotRealLoc 1 | 1 Test Dr, Vik, Iceland, Palau 00000                         |            |              |

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Next →

# Step 3 of 5: Select Provider Account

The scheduling feature in CVMS can be enabled for each provider location account. Once your account has been enabled, all vaccination site locations associated with that provider location can begin using the scheduling feature in CVMS.

- 1. Select the provider(s) for which you want to enable the scheduling feature in CVMS
- 2. Click **NEXT**

## Audience

Healthcare  
Location  
Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryMore

Select Accounts

Please select the PE Location that you would like to enable for CVMS Scheduling. If you do not see your PE Location from this list, then it has already been enabled with self-attestation completed.

| <input type="checkbox"/> | Name               | Address 1           | Address 2 | City    | State          | Zip Code | Provider PIN |
|--------------------------|--------------------|---------------------|-----------|---------|----------------|----------|--------------|
| <input type="checkbox"/> | Sunny Skies Clinic | 1355 Springlawn ... |           | Raleigh | North Carolina | 27609    | 417052       |

Cancel

Next

DoNotUse-FakeLocation

Clinic Org1

163 E Franklin St, Chapel Hill, NC 27514, Chapel Hill, North Carolina 27514

TEST Clinic Location1 - Community Vaccination Event

Clinic Org1

123 red robin, red, North Carolina 27613 555-555-5555

03/22/2021

04/06/2021

## Step 4 of 5: Review Questions

Read and review the statements. You must agree to all statements before you can enable the scheduling feature in CVMS for your location.

1. Check the checkbox attesting that you understand each statement
2. Click **SAVE**

### Audience

Healthcare  
Location  
Manager

### Questions

The scheduling feature in CVMS is an optional tool available to enrolled and onboarded COVID-19 vaccination providers. It will allow your locations to release a certain number of appointment slots to the general public. People will be able to self-schedule their first appointment and register in CVMS at the same time. You will then be able to schedule their 2nd dose appointment at the time of their 1st dose appointment.

- ☒ I understand that the scheduling tool is to release appointments made available to the general public and is NOT for vaccinating only a selected population group.
- ☒ I understand that we are responsible for adding and managing location information on the Site Locator.
- ☒ I understand that if we choose to use the CVMS scheduling feature, we are responsible for:
  - Managing appointment availability in the scheduling feature
  - Maintaining accurate scheduling, including adding or removing appointments as needed
  - Adding the appointment slots for 1st and 2nd doses to the scheduling feature in CVMS for my location


[Back](#) [Save](#)

# Step 5 of 5: Navigate to the Locations Tab

*Congratulations! Your selected location is now enabled to use the scheduling feature in CVMS!*

## Audience

Healthcare  
Location  
Manager



Success!

Scheduling enabled for selected accounts

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Filter by Name

Filter by Address

Filter by Start Date

Filter by Closing Date

New

Enable Scheduling

Location Name

Account

Address

Start Date

Closing Date

Pop-up vaccination site 1 - Regiontest

DoNotUse - NotRealLoc 1

123 Main St, Testcity, North Carolina 08619

Pop-up Vaccination site 2 - DoNotUse-NotRealLoc-SS

DoNotUse - NotRealLoc 1

320 Vax Way, Vik, Iceland, North Carolina 12345 111-111-1111

Primary Vaccination Site \_TEST1

DoNotUse - NotRealLoc 1

56, chg, North Carolina 3568900 112-233-4455

Pop-up vaccination site 3 - TestBAPhoneNumber

DoNotUse - NotRealLoc 1

asdasd, adasdas, North Carolina 10102 969-685-7200

Pop-up vaccination 4 - Test Gelocation R10

DoNotUse - NotRealLoc 1

1 Test Dr, Vik, Iceland, Palau 00000

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Next

# **Activate Scheduling for Each of Your Vaccination Site Location**

# Step 1 of 4: Navigate to the Locations Tab

1. Click on the **LOCATIONS** tab



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You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

| TIME                 | DETAILS                                 | CASE NUMBER | LOCATION         |
|----------------------|---|-------------|------------------|
| Mar 10, 21, 08:00 AM | TJ TJ<br>Dose 1 Scheduled               | 03045802    | Clinic Location1 |
| Mar 10, 21, 09:47 AM | Wednesday Morning<br>Dose 1 Scheduled   | 03045809    | Clinic Location1 |
| Mar 10, 21, 09:57 AM | Jennifer Yu<br>Dose 2 Scheduled         | 03045108    | Clinic Location1 |
| Mar 10, 21, 10:46 AM | Tar Ramses Heels<br>Dose 1 Scheduled    | 03045812    | Clinic Location1 |
| Mar 10, 21, 10:48 AM | Buzz Fred Lightyear<br>Dose 1 Scheduled | 03045814    | Clinic Location1 |

View all

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Audience

Healthcare  
Location  
Manager



# Step 2 of 4: Select the Location

1. Click on the **LOCATION NAME** for which you wish to enable the scheduling feature in CVMS

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

NewEnable Scheduling

Filter by Name

Filter by Address

Filter by Start Date

Filter by Closing Date

| Location Name                                      | Account                 | Address  | Start Date | Closing Date |
|--|-------------------------|--|------------|--------------|
| Pop-up vaccination site 1 - Regiontest             | DoNotUse - NotRealLoc 1 | 123 Main St, Testcity, North Carolina 08619                  |            |              |
| Pop-up Vaccination site 2 - DoNotUse-NotRealLoc-SS | DoNotUse - NotRealLoc 1 | 320 Vax Way, Vik, Iceland, North Carolina 12345 111-111-1111 |            |              |
| Primary Vaccination Site_ TEST1                    | DoNotUse - NotRealLoc 1 | 56, chg, North Carolina 3568900 112-233-4455                 |            |              |
| Pop-up vaccination site 3 - TestBAPhoneNumber      | DoNotUse - NotRealLoc 1 | asdasd, adasdas, North Carolina 10102 969-685-7200           |            |              |
| Pop-up vaccination 4 - Test Gelocation R10         | DoNotUse - NotRealLoc 1 | 1 Test Dr, Vik, Iceland, Palau 00000                         |            |              |

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## Audience

Healthcare  
Location  
Manager

## Tips

You can choose to enable the scheduling feature in CVMS for some or all your vaccination site locations.

# Step 3 of 4: Edit your Location Record

Navigating to the Details tab allows you to view and edit location details.

- 1. Click **EDIT**

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

LocationPrimary Vaccination Site \_ TEST1Edit

DetailsRelatedAvailability

Location NamePrimary Vaccination Site \_ TEST1

Event Type1Not Applicable

Scheduling Information

Display on Vaccine Site Locator1No

Appointment Phone1112-233-4455

Available Vaccine Brands

Address

AccountDoNotUse - NotRealLoc 1

Appointment Scheduling Website1

Brand Override☐

Provider Website

## Audience

Healthcare  
Location  
Manager

## Tips

Locations will be displayed on the Vaccine Site Locator website <https://vaccines.gov> if the Display on Vaccine Site Locator field is set to **YES** and if the Location Setting field is set to **DEFAULT**.

# Step 4 of 4: Activate the Scheduling Feature of CVMS for your Location

- 1. Check the **CVMS SCHEDULING** box
- 2. Select the date range to use the scheduling feature
- 3. Click **Save**

Edit Primary Vaccination Site \_ TEST1

--None--

--None--

Thursday Start Time

Thursday End Time

--None--

--None--

Friday Start Time

Friday End Time

--None--

--None--

Saturday Start Time

Saturday End Time

--None--

--None--

Sunday Start Time

Sunday End Time

--None--

--None--

Fields Required for locations using the Scheduling feature

CVMS Scheduling

☒

Created By

Revathy Rangan, 7/8/2021, 6:29 AM

Last Modified By

Simon Couderc, 9/20/2021, 11:57 AM

Start Date

9/13/2021

Closing Date

12/31/2021

Cancel

Save & New

Save

## Audience

Healthcare  
Location  
Manager

## Tips

Both **CVMS Scheduling** and **Display on Vaccine Site Locator** should be checked to allow recipients to find your site and book appointments.

# **Publish Appointment slots using the Scheduling Feature in CVMS**

# Set Maximum Number of Appointments

# Setting Vaccine Supply



**“Vaccine (Appointment) Supply” is what sets the total number of first dose, second dose or additional dose/booster appointments available**

- Set 1<sup>st</sup> dose and additional dose/booster Vaccine Supplies to equal the number of appointments you want to make available for that location
- We recommend to set the dose 2 Vaccine supply to a very large number as 2<sup>nd</sup> dose appointments are booked by the providers directly, so there is no need to limit that number
- It does NOT need to be the same as your total inventory on hand.
  - If you need to hold back doses (e.g., set aside for a planned event, Historically Marginalized Population outreach), do not include those in the “Vaccine Supply”
- You should only release the number of First-Dose and Additional Dose/Booster appointments that you know your location can handle, and add to this number frequently as you reach the maximum number set


# Step 1 of 7: Navigate to the Location

Set the weekly schedule to share your available times to receive vaccine appointments. The same weekly schedule will be used to book 1<sup>st</sup>, 2<sup>nd</sup>, and any additional dose/booster appointments if applicable. To begin, you must navigate to the location.

- 1. Click on the **LOCATION TAB**
- 2. Click on the **LOCATION NAME** hyperlink

## Audience

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Filter by Name

Filter by Address

Filter by Start Date

Filter by Closing Date

New

Enable Scheduling

| Location Name                                      | Account                 | Address  | Start Date | Closing Date |
|--|-------------------------|--|------------|--------------|
| Pop-up vaccination site 1 - Regiontest             | DoNotUse - NotRealLoc 1 | 123 Main St, Testcity, North Carolina 08619                  |            |              |
| Pop-up Vaccination site 2 - DoNotUse-NotRealLoc-SS | DoNotUse - NotRealLoc 1 | 320 Vax Way, Vik, Iceland, North Carolina 12345 111-111-1111 |            |              |
| Primary Vaccination Site_ TEST1                    | DoNotUse - NotRealLoc 1 | 56, chg, North Carolina 3568900 112-233-4455                 |            |              |
| Pop-up vaccination site 3 - TestBAPhoneNumber      | DoNotUse - NotRealLoc 1 | asdasd, adasdas, North Carolina 10102 969-685-7200           |            |              |
| Pop-up vaccination 4 - Test Gelocation R10         | DoNotUse - NotRealLoc 1 | 1 Test Dr, Vik, Iceland, Palau 00000                         |            |              |

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# Step 2 of 7: Edit your 1<sup>st</sup> Dose Vaccine Supply Record

- 1. Click on **RELATED**
- 2. Click on the down arrow for the **DOSE NUMBER 1 VACCINE SUPPLY RECORD**
- 3. Click **EDIT**

## Audience

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Location

Primary Vaccination Site \_ TEST1

Edit

Details

Related

Availability

Jobs (0)

Vaccine Supplies (3)

| Name                      | Current Stock | Vaccine Brand      | Dose Number |
|---------------------------|---------------|--------------------|-------------|
| <a href="#">SUP-00268</a> | 0             | Generic            | 1           |
| <a href="#">SUP-00269</a> | 0             | Generic            | 2           |
| <a href="#">SUP-00476</a> | 0             | Additional/Booster | 1           |

Edit

Edit

View All



# Step 3 of 7: Add new appointments to the Number of 1<sup>st</sup> Dose Appointments Offered

1. Increase the **CURRENT STOCK** amount to allow new 1<sup>st</sup> dose appointments to be offered

*Note: Each appointment scheduled by a recipient will reduce the remaining number of appointments. Therefore, add to the current stock to allow for additional appointments.*

*For example, if you wish to allow 100 additional appointments and the current stock is set at 900, update the Current Stock field to show 1,000.*

2. Click **SAVE**

Edit SUP-00268

Name

SUP-00268

Vaccine

VAX-0001

Current Stock

1,000

Date of Stock Count

7/8/2021

Location

Primary Vaccination Site \_ TEST1

Vaccine Brand

Generic

Dose Number

1

System Information

Created By

Revathy Rangan, 7/8/2021, 6:29 AM

Owner

Revathy Rangan

Last Modified By

Revathy Rangan, 7/8/2021, 6:29 AM

Cancel

Save


## Audience

Healthcare  
Location  
Manager

## Tips

There is no correlation between Inventory and Vaccine (Appointment) Supply in CVMS. You need to be aware of your vaccine inventory and upcoming allocations to avoid over booking appointments.

You should only increase this current stock and never reduce it, as it represents the maximum number of appointments released since you begin using the feature. If your current stock is less than number of appointments booked, then people will not see any availability at your location for a dose 1 appointment.



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HUMAN SERVICES

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# Step 4 of 7: Edit your 2<sup>nd</sup> Dose Vaccine Supply Records

- 1. Click on **RELATED**
- 2. Click on the down arrow for the **DOSE NUMBER 2 VACCINE SUPPLY RECORD**
- 3. Click **EDIT**

## Audience

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Location

Primary Vaccination Site \_ TEST1

Edit

Details

Related

Availability

Jobs (0)

Vaccine Supplies (3)

| Name                      | Current Stock | Vaccine Brand      | Dose Number |   |
|---------------------------|---------------|--------------------|-------------|---|
| <a href="#">SUP-00268</a> | 0             | Generic            | 1           | ▼ |
| <a href="#">SUP-00269</a> | 0             | Generic            | 2           | ▼ |
| <a href="#">SUP-00476</a> | 0             | Additional/Booster | 1           | ▼ |

Edit

View All

View All

Edit

# Step 5 of 7: Add New Appointments to the Number of 2<sup>nd</sup> Dose Appointments Offered

- 1. Increase the **CURRENT STOCK** amount to allow new 2<sup>nd</sup> dose appointments to be offered.

*Note: When recipients have received for their first-dose appointment, only, you, the vaccine providers, will be able to schedule their second-dose appointment (if applicable). Therefore, the risk of overbooking is extremely low. We recommend that you make the Current Stock large, so you do not need to maintain the number of second and additional dose/booster appointments to be released in the system.*

- 2. Click **SAVE**

## Audience

Healthcare  
Location  
Manager

Edit SUP-00269

Name

SUP-00269

Vaccine

VAX-0001

Current Stock

1,000,000

Date of Stock Count

7/8/2021

Location

Primary Vaccination Site \_ TEST1

Vaccine Brand

Generic

Dose Number

2

System Information

Created By

Revathy Rangan, 7/8/2021, 6:29 AM

Last Modified By

Revathy Rangan, 7/8/2021, 6:29 AM

Owner

Revathy Rangan

Cancel

Save

# Step 6 of 7: Edit your Additional Dose/Booster Vaccine Supply Record

- 1. Click on **RELATED**
- 2. Click on the down arrow for the **ADDITIONAL DOSE/BOOSTER NUMBER VACCINE SUPPLY RECORD**
- 3. Click **EDIT**

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Location

Primary Vaccination Site \_ TEST1

Edit

Details

**Related**

Availability

Jobs (0)

Vaccine Supplies (3)

| Name                      | Current Stock | Vaccine Brand      | Dose Number |   |
|---------------------------|---------------|--------------------|-------------|---|
| <a href="#">SUP-00268</a> | 0             | Generic            | 1           | ▼ |
| <a href="#">SUP-00269</a> | 0             | Generic            | 2           | ▼ |
| <a href="#">SUP-00476</a> | 0             | Additional/Booster | 1           | ▼ |

Edit

View All

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# Step 7 of 7: Add new appointments to the Number of Additional Dose/Booster Appointments Offered

1. Increase the **CURRENT STOCK** amount to allow new additional dose/booster appointments to be offered  
*For example, if you wish to allow 100 additional dose/booster appointments and the current stock is set at 900, update the Current Stock field to show 1,000.*

2. Click **SAVE**

Edit SUP-00476

Name

SUP-00476

Vaccine

VAX-0003

Current Stock ⓘ

1,000

Date of Stock Count ⓘ

Location

Primary Vaccination Site \_ TEST1

Vaccine Brand

Additional/Booster

Dose Number ⓘ

1

System Information

Created By

Sanjay Sharma, 9/15/2021, 12:43 PM

Last Modified By

Sanjay Sharma, 9/15/2021, 12:43 PM

Owner

Sanjay Sharma

Cancel

Save

## Audience

Healthcare  
Location  
Manager

## Tips

Like the Dose 1 Vaccine Supply record, you should **only increase this current stock and never reduce it,** as it represents the maximum number of appointments released since you began using the scheduling feature in CVMS. If your current stock is less than the number of appointments booked, then people will not see any availability at your location for an additional dose/booster appointments.

# **Set Weekly Location Schedule for Dose 1, Dose 2, and Additional Dose/ Booster Appointments**


# Step 1 of 8: Navigate to the Location

Set the weekly schedule to share your available times to receive vaccine appointments. The same weekly schedule will be used to book 1<sup>st</sup>, 2<sup>nd</sup>, and additional dose/booster appointments if applicable. To begin, you must navigate to the location.

- 1. Click on the **LOCATION TAB**
- 2. Click on the **LOCATION NAME** hyperlink

## Audience

Healthcare  
Location  
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Filter by Name

Filter by Address

Filter by Start Date

Filter by Closing Date

New

Enable Scheduling

| Location Name        | Account        | Address   | Start Date | Closing Date |
|----------------------|----------------|---|------------|--------------|
| Cross Creek Mall     | Solutions Loc1 | 419 Cross Creek Mall Suite 12345, Fayetteville, North Carolina 28303 222-333-4444 |            |              |
| Test Event           | Solutions Loc3 | 419 Cross Creek Mall Suite 12345, Fayetteville, North Carolina 28303 222-333-4444 |            |              |
| Solutions Loc1       | Solutions Loc1 | Test, Test, North Carolina 28200 3457465789                                       | 03/29/2021 | 04/04/2037   |
| Solutions Location 1 | Solutions Loc1 | 1 Happy Street, Morrisville, North Carolina 27560 9194445555                      | 03/29/2021 | 12/31/2021   |

## Step 2 of 8: Set the Dates for which Recipients can Book an Appointment

First dose and additional dose/booster appointment slots will be available for recipients to book appointments between the **START DATE** and **CLOSING DATE** for a location.

1. Click on the **DETAILS** tab
2. Click Edit
3. Enter the location **START DATE**
4. Enter the location **CLOSING DATE**
5. Click **SAVE**

The screenshot displays the 'Edit Sunny Skies Clinic' modal window. The 'CVMS Scheduling' section is active, showing 'Start Date' as 5/31/2021 and 'Closing Date' as 6/4/2021. The 'Save' button at the bottom right is highlighted with a red box. In the background, the 'Details' tab is selected, and the 'Edit' button is also highlighted with a red box.

### Audience

Healthcare  
Location  
Manager

### Tips

You may regularly edit the **CLOSING DATE** to extend it as you receive more **VACCINE INVENTORY**.


Second dose appointments will be available for booking after the minimum period between 2 doses (if applicable). See the Check-in Recipient and Document Vaccination User Guide for additional instructions at <https://covid19.ncdhhs.gov/step-10-check-recipients-and-document-vaccination>



# Step 3 of 8: Open the Availability tab

The default vaccination schedule for a location is created and managed on the **AVAILABILITY TAB**.

- 1. Click on the **AVAILABILITY TAB**



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Location

Kevin's Pharmacy

Edit

Details

Related

Availability

Default hours

Set your locations default opening hours and capacity. These are used to display the opening times of your location on search results.

| Day                          | Opening hours | Time window duration (mins) | Appointments per time window |
|------------------------------|---------------|-----------------------------|------------------------------|
| <input type="checkbox"/> MON | Unavailable   |                             |                              |
| <input type="checkbox"/> TUE | Unavailable   |                             |                              |

## Audience

Healthcare  
Location  
Manager

## Tips

All previously scheduled appointments will be unaffected by updates to the vaccination schedule.

# Step 4 of 8: Select Opening Days

A location will set weekly time to administer vaccinations from its **START DATE** to its **CLOSING DATE** for dose 1, dose 2, and additional dose/booster appointments.

- 1. Check the checkbox for each day you will administer vaccinations at this location (Monday through Sunday)

## Audience

Healthcare  
Location  
Manager

## Tips

Unselected days will not be open to appointments.

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Location

Primary Vaccination Site \_ TEST1

Edit

DetailsRelatedAvailability

Default hours

Set your locations default opening hours and capacity. These are used to display the opening times of your location on search results.

| Day                                     | Opening hours   | Time window duration (mins) | Appointments per time window | Total appointments |
|---|---|-----------------------------|------------------------------|--------------------|
| <input checked="" type="checkbox"/> MON | <div>12:00 AM</div> <div>12:00 AM</div> <div><input type="checkbox"/> All day</div> | <div>0</div>                | <div>0</div>                 | <div>Actions</div> |
| <input checked="" type="checkbox"/> TUE | <div>12:00 AM</div> <div>12:00 AM</div> <div><input type="checkbox"/> All day</div> | <div>0</div>                | <div>0</div>                 | <div>Actions</div> |
| <input checked="" type="checkbox"/> WED | <div>12:00 AM</div> <div>12:00 AM</div> <div><input type="checkbox"/> All day</div> | <div>0</div>                | <div>0</div>                 | <div>Actions</div> |
| <input checked="" type="checkbox"/> THU | <div>12:00 AM</div> <div>12:00 AM</div> <div><input type="checkbox"/> All day</div> | <div>0</div>                | <div>0</div>                 | <div>Actions</div> |
| <input checked="" type="checkbox"/> FRI | <div>12:00 AM</div> <div>12:00 AM</div> <div><input type="checkbox"/> All day</div> | <div>0</div>                | <div>0</div>                 | <div>Actions</div> |
| <input type="checkbox"/> SAT            | Unavailable   |                             |                              |                    |

How may I help you?

# Step 5 of 8: Set Opening Hours

For each open day you will need to set the **OPENING HOURS** per time window. You can have multiple time windows within the same day. To add another time window, click on the **ACTIONS** on the right and select **ADD TIME**.

- 1. Enter the **OPENING HOURS**

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Location

Primary Vaccination Site \_ TEST1

Edit

DetailsRelatedAvailability

Default hours

Set your locations default opening hours and capacity. These are used to display the opening times of your location on search results.

| Day                                     | Opening hours   |  | Time window duration (mins) | Appointments per time window | Total appointments |                                       |
|---|---|--|-----------------------------|------------------------------|--------------------|---------------------------------------|
| <input checked="" type="checkbox"/> MON | <div><div>08:00 A...<div></div></div><div>12:00 P...<div></div></div><div>12:45 P...<div></div></div><div>05:00 P...<div></div></div></div> <div><input type="checkbox"/> All day</div> |  |                             |                              |                    |                                       |
|   |   |  | <div>0</div>                | <div>0</div>                 |                    | <div>Actions<div></div></div>         |
|   |   |  | <div>0</div>                | <div>0</div>                 |                    | <div>Actions<div></div></div>         |
| <input type="checkbox"/> TUE            | Unavailable   |  |                             |                              |                    | <div>Add time</div> <div>Remove</div> |

## Audience

Healthcare  
Location  
Manager

## Tips

Do not check the **ALL DAY** checkbox as this will allow appointments to be scheduled over a 24-hour period.

You may not enter a time twice on the same day (e.g., a time window on Monday from 8 AM to 6 PM and another time window on Monday from 8 AM to 11 AM).

# Step 6 of 8: Enter Time Window Duration

The **TIME WINDOW DURATION (MIN)** is the length of time it takes for a single vaccinator to administer a vaccination (typically 5 to 15 minutes). Appointments will be created at evenly spaced intervals throughout the **OPENING HOURS** at the location. If the **OPENING HOURS** require a unique **TIME WINDOW DURATION**, you must add another opening hours.

- 1. Enter the **TIME WINDOW DURATION (MIN)** applicable for the entire schedule at this location

## Audience

Healthcare  
Location  
Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

LocationPrimary Vaccination Site \_ TEST1Edit

DetailsRelatedAvailability

Default hours

Set your locations default opening hours and capacity. These are used to display the opening times of your location on search results.

| Day                                     | Opening hours  | Time window duration (mins) | Appointments per time window | Total appointments                    |
|---|--|-----------------------------|------------------------------|---------------------------------------|
| <input checked="" type="checkbox"/> MON | <div>08:00 A...12:00 P...All day</div> <div>12:45 P...05:00 P...</div> | <div>15</div> <div>15</div> | <div></div> <div></div>      | <div>Actions</div> <div>Actions</div> |
| <input type="checkbox"/> TUE            | Unavailable  |                             |                              |                                       |

# Step 7 of 8: Enter Appointments Per Time Window

Appointments per time window is the number of people you can vaccinate at the same time. If the **OPENING HOURS** require a unique **APPOINTMENTS PER TIME WINDOW**, you must add another opening hours.

- 1. Enter the **APPOINTMENTS PER TIME WINDOW**

*Note: The number of appointments will automatically display based on the information entered.*

## Audience

Healthcare  
Location  
Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Location

Primary Vaccination Site \_ TEST1

Edit

DetailsRelatedAvailability

Default hours

Set your locations default opening hours and capacity. These are used to display the opening times of your location on search results.

| Day                                     | Opening hours   | Time window duration (mins) | Appointments per time window | Total appointments |                    |
|---|---|-----------------------------|------------------------------|--------------------|--------------------|
| <input checked="" type="checkbox"/> MON | <div>08:00 A...<div></div></div> <div>12:00 P...<div></div></div> <div><input type="checkbox"/> All day</div> | <div>15</div>               | <div>2</div>                 | 32                 | <div>Actions</div> |
|   | <div>12:45 P...<div></div></div> <div>05:00 P...<div></div></div>   | <div>15</div>               | <div>2</div>                 | 34                 | <div>Actions</div> |
| <input type="checkbox"/> TUE            | Unavailable   |                             |                              |                    |                    |

# Step 8 of 8: Finalize Schedule

You have now created a default schedule for your location.

- 1. **REVIEW** the schedule for the location
- 2. Click **SAVE**

*Congratulations! You have now finalized the default schedule for your location!*

## Audience

Healthcare  
Location  
Manager

## Tips

The schedule determines the number of appointment slots. For an appointment to be made, there must be an open appointment slot and available vaccine (appointment) supply.

| Day                                     | Opening hours            | Time window duration (mins) | Appointments per time window     | Total appointments |                    |
|---|--------------------------|-----------------------------|----------------------------------|--------------------|--------------------|
| <input checked="" type="checkbox"/> MON | 08:00 A...<br>12:45 P... | 12:00 P...<br>05:00 P...    | <input type="checkbox"/> All day | 15<br>15           | 2<br>2             |
|   |                          |                             |                                  | 32<br>34           | Actions<br>Actions |
| <input type="checkbox"/> TUE            | Unavailable              |                             |                                  |                    |                    |
| <input type="checkbox"/> WED            | Unavailable              |                             |                                  |                    |                    |
| <input type="checkbox"/> THU            | Unavailable              |                             |                                  |                    |                    |
| <input type="checkbox"/> FRI            | Unavailable              |                             |                                  |                    |                    |
| <input type="checkbox"/> SAT            | Unavailable              |                             |                                  |                    |                    |
| <input type="checkbox"/> SUN            | Unavailable              |                             |                                  |                    |                    |

Cancel

Save

# Create Non-Regular Availability


# Step 1 of 4: Navigate to the Location

Set a non-regular availability schedule to create a schedule when your location does not follow the default schedule availability in the case of holiday closure, reduced hours, large vaccination event, or more.

- 1. Click on the **LOCATION TAB**
- 2. Click on the **LOCATION NAME** hyperlink

**Audience**

Healthcare  
Location  
Manager



NCDHHS  
CVMS Provider Portal

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

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More

New

Enable Scheduling

Filter by Name

Filter by Address

Filter by Start Date

Filter by Closing Date

| Location Name                                    | Account                                 | Address   | Start Date | Closing Date |  |
|--|---|---|------------|--------------|--|
| Training Team Vaccine Provider - Site 1          | Training Team Vaccine Provider - Site 1 | 1332 Turner Woods Drive, Raleigh, North Carolina 27603 9196000979 | 05/13/2021 | 05/31/2021   |  |
| Training Team Vaccine Provider - Location Site 2 | Training Team Vaccine Provider - Site 2 | 123 Test Dr, Raleigh, North Carolina 27609 919-919-9191           | 05/17/2021 | 05/21/2021   |  |
| Kevin's Pharmacy                                 | TestLoc_UAT1                            | 6611 Lake Hill Dr, Raleigh, North Carolina 27609 919-919-9191     | 05/31/2021 | 06/11/2021   |  |

← Previous

Page 4 out of 4

Next →



# Step 2 of 4: Open the Availability tab

Non-regular availability is set on the Availability tab. The default schedule is at the top. If the location does not follow this schedule, create an **AVAILABILITY OVERRIDE**.

- 1. Click on the **AVAILABILITY TAB**
- 2. Scroll-down to the bottom of the page, and click the **NEW AVAILABILITY OVERRIDE** button

☐ THU

Unavailable

☐ FRI

Unavailable

☐ SAT

Unavailable

☐ SUN

Unavailable

Cancel

Save

Availability overrides

Override your default hours and capacity for a period of time. A maximum of 10 overrides can be active at once.

New availability override

## Audience

Healthcare  
Location  
Manager

## Tips

A location can have up to 10 **AVAILABILITY OVERRIDES**.

# Step 3 of 4: Set Override Dates

The Availability Override schedule will override the default schedule availability between the dates that you set.

- 1. Set the beginning of the Availability Override in the **FROM** field
- 2. Set the end of the Availability Override in the **UP TO AND INCLUDING** field

## Audience

Healthcare  
Location  
Manager

## Tips

For a single day closure, select the same date in the two date fields FROM and UP TO AND INCLUDING.

If the override does not currently have an end date, select the No end date, run ongoing checkbox

### Availability overrides

Override your default hours and capacity for a period of time. A maximum of 10 overrides can be active at once.

Actions

Select the date range you want to override

From

2021-05-31

Up to and including

2021-05-31

☐ No end date, run ongoing

#### Weekly pattern

| Day                          | Opening hours | Time window duration (mins) | Appointments per time window |
|------------------------------|---------------|-----------------------------|------------------------------|
| <input type="checkbox"/> MON | Unavailable   |                             |                              |
| <input type="checkbox"/> TUE | Unavailable   |                             |                              |
| <input type="checkbox"/> WED | Unavailable   |                             |                              |

# Step 4 of 4: Set Availability Schedule for Override Dates

Create the override availability schedule for the location. See the *Set Weekly Location Schedule for Dose 1, Dose 2, and Additional Dose/Booster Appointments* section for more information on creating an availability schedule. Note, this schedule will only apply to the location between the availability override dates.

- 1. Set your override availability schedule
- 2. Click **SAVE**

## Audience

Healthcare  
Location  
Manager

Availability overrides

Override your default hours and capacity for a period of time. A maximum of 10 overrides can be active at once.

Actions

Select the date range you want to override

From

Up to and including

2021-05-31

2021-05-31

No end date, run ongoing

Weekly pattern

| Day                          | Opening hours | Time window duration (mins) | Appointments per time window |
|------------------------------|---------------|-----------------------------|------------------------------|
| <input type="checkbox"/> MON | Unavailable   |                             |                              |
| <input type="checkbox"/> TUE | Unavailable   |                             |                              |
| <input type="checkbox"/> WED | Unavailable   |                             |                              |

# **Review Number of Appointments Booked and Remaining Quantity**


# Step 1 of 3: Navigate to Reports

Once you published your first schedule and received your first appointments, you will need to regularly update the number of 1<sup>st</sup> Dose and additional dose/booster appointments released in the system. A report is provided to you to aid you in releasing additional appointments.

- 1. Under the **MORE** tab, select **REPORTS**

## Audience

Healthcare  
Location  
Manager



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More ^

You are currently logged in as Solutions Loc1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

| TIME | DETAILS | CASE NUMBER |
|------|---------|-------------|
|------|---------|-------------|

Organization Management

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Account Management

Files

## Step 2 of 3: Open Vaccine Supply Report

The **DOSE 1 VACCINE SUPPLY REPORT** and **DOSE 2 VACCINE SUPPLY REPORT** are found in the All-Reports folder. Here, you will view all the reports available to Healthcare Location Managers.

1. Click on the **ALL REPORTS** folder
2. Click on the **DOSE 1 VACCINE SUPPLY REPORT** or **DOSE 2 VACCINE SUPPLY REPORT**

### Audience

Healthcare  
Location  
Manager

### Tips

You will not need to maintain the dose 2 Vaccine Supply records once created if you make the Current Stock very large.

The screenshot shows the NCDHHS CVMS Provider Portal interface. The top navigation bar includes links for Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, Vaccine Marketplace, Shipments, and More. Below the navigation bar, a message states: "For assistance with field definitions for the Reports below, please visit the Help & Information tab and view the Dictionary for Provider Reports help articles." The main content area is titled "Reports" and "All Reports" with a search bar and a settings icon. A table lists 11 items, with the "All Reports" folder highlighted in the left sidebar. The table contains the following data:

| REPORTS         | Report Name  | Description  | Folder                           | Created By                              | Created On          | Subscribed |
|-----------------|--|--|----------------------------------|---|---------------------|------------|
| Recent          | <a href="#">Availability Report</a>                          | Availability Report per Skedulo location   | <a href="#">Provider Reports</a> | <a href="#">Copado Integration User</a> | 4/27/2021, 12:31 PM |            |
| Created by Me   | <a href="#">Dose 1 Vaccine Supply Report</a>                 | Vaccine supply Current Stock for Dose 1  | <a href="#">Provider Reports</a> | <a href="#">Copado Integration User</a> | 4/27/2021, 12:31 PM |            |
| Private Reports | <a href="#">Dose 2 Vaccine Supply Report</a>                 | Vaccine supply Current Stock for Dose 2  | <a href="#">Provider Reports</a> | <a href="#">Copado Integration User</a> | 4/27/2021, 12:31 PM |            |
| FOLDERS         |  |  |                                  |   |                     |            |
| All Folders     | <a href="#">Expiring Doses by Account &amp; Manufacturer</a> | Breakdown of upcoming Vaccine Expirations by Account & Manufacturer. DPHSF-7808. | <a href="#">Provider Reports</a> | <a href="#">Copado Integration User</a> | 8/4/2021, 3:35 PM   |            |
| Created by Me   |  |  |                                  |   |                     |            |
| Shared with Me  | <a href="#">HCLM EHR Error Report - Cases</a>                |  | <a href="#">2489 Reports</a>     | <a href="#">George Jaramillo</a>        | 2/14/2021, 8:53 PM  |            |
| FAVORITES       |  |  |                                  |   |                     |            |
| All Favorites   | <a href="#">HCP Healthcare Roles</a>                         | This report identifies all users and associated roles at the location.           | <a href="#">Provider Reports</a> | <a href="#">George Jaramillo</a>        | 1/31/2021, 8:30 PM  |            |

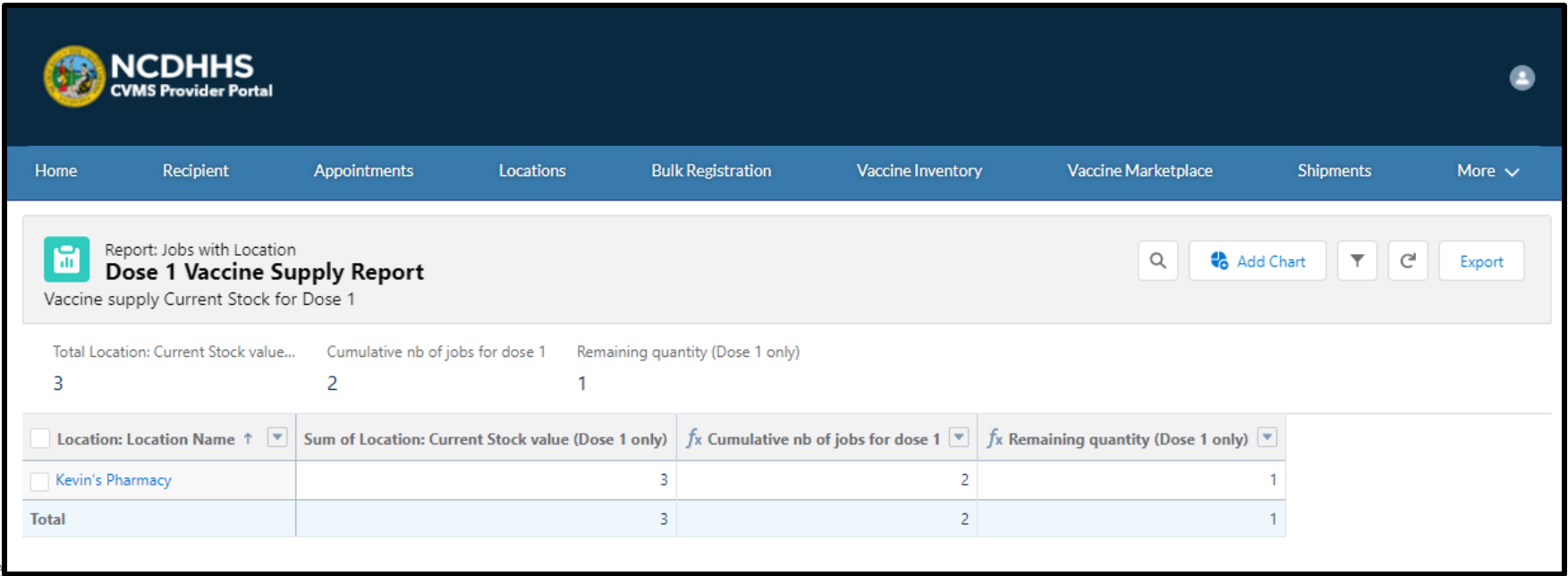
# Step 3 of 3: Review Vaccine Supply Report

The **VACCINE SUPPLY REPORTS** show you the Current Stock as the location, the number of appointments (jobs) for the relevant dose, and the number of additional appointments that can be booked (remaining quantity). If the **REMAINING QUANTITY** is larger than 0, recipients will be able to book an appointment at this location if there is an available appointment slot. If this number is 0 or less, you must increase the current the Current Stock so that the Remaining Quantity is larger than 0 before additional recipients can book appointments.

- 1. Review the **REMAINING QUANTITY** and determine how many additional appointments to release
- 2. Click on the location name hyperlink to edit as explained in the [SET MAXIMUM NUMBER OF APPOINTMENTS](#) section of this user guide

## Audience

Healthcare  
Location  
Manager



# Review Availability Report




# Step 1 of 3: Navigate to Reports

If you wish to review your location’s schedule availability for the next 7 days, the **AVAILABILITY REPORT** will show you the number of appointment slots, booked appointments, and remaining appointments.

- 1. Click on the **REPORTS** tab

## Audience

Healthcare  
Location  
Manager



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More ^

You are currently logged in as Solutions Loc1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

| TIME | DETAILS | CASE NUMBER |
|------|---------|-------------|
|------|---------|-------------|

Organization Management

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# Step 2 of 3: Open Availability Report

The **AVAILABILITY REPORT** is found in the All-Reports folder. Here, you will view all the reports available to Healthcare Location Managers.

- 1. Click on the **ALL REPORTS** folder
- 2. Click on the **AVAILABILITY REPORT**

## Audience

Healthcare  
Location  
Manager



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

For assistance with field definitions for the Reports below, please visit the Help & Information tab and view the Dictionary for Provider Reports help articles.

Reports

All Reports

12 items

REPORTS

Recent

Created by Me

Private Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Report Name

Description

Folder

Created By

Created On

Subscribed

Availability Report

Dose 1 Vaccine Supply Report


Dose 2 Vaccine Supply Report

Expiring Doses by Account & Manufacturer

HCLM EHR Error Report - Cases

This report identifies all users

## Step 3 of 3: Review Schedule Availability for the Next 7 Days



The screenshot displays the NCDHHS CVMS Provider Portal interface. The top navigation bar includes links for Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, Vaccine Marketplace, Shipments, and More. The main content area shows a report titled "Report: Day Reports with Location Availability Report" for "Training Team Vaccine Provider - Site 1". The report includes a summary table and a detailed table of appointment slots.

| Number of Appointment slots per ... | Number of slots booked for a Dos... | Number of slots booked for a Dos... | Remaining Quantity of slots |
|-------------------------------------|-------------------------------------|-------------------------------------|-----------------------------|
| 240                                 | 0                                   | 0                                   | 240                         |

| Location: Location Name ↑               | Date ↑    | fx Number of Appointment slots per day | fx Number of slots booked for a Dose 1 | fx Number of slots booked for a Dose 2 | fx Remaining Quantity of slots |
|---|-----------|--|--|--|--------------------------------|
| Training Team Vaccine Provider - Site 1 | 5/17/2021 | 96                                     | 0                                      | 0                                      | 96                             |
|   | 5/18/2021 | 144                                    | 0                                      | 0                                      | 144                            |
| Total                                   |           | 240                                    | 0                                      | 0                                      | 240                            |

### Audience

Healthcare  
Location  
Manager

### Tips

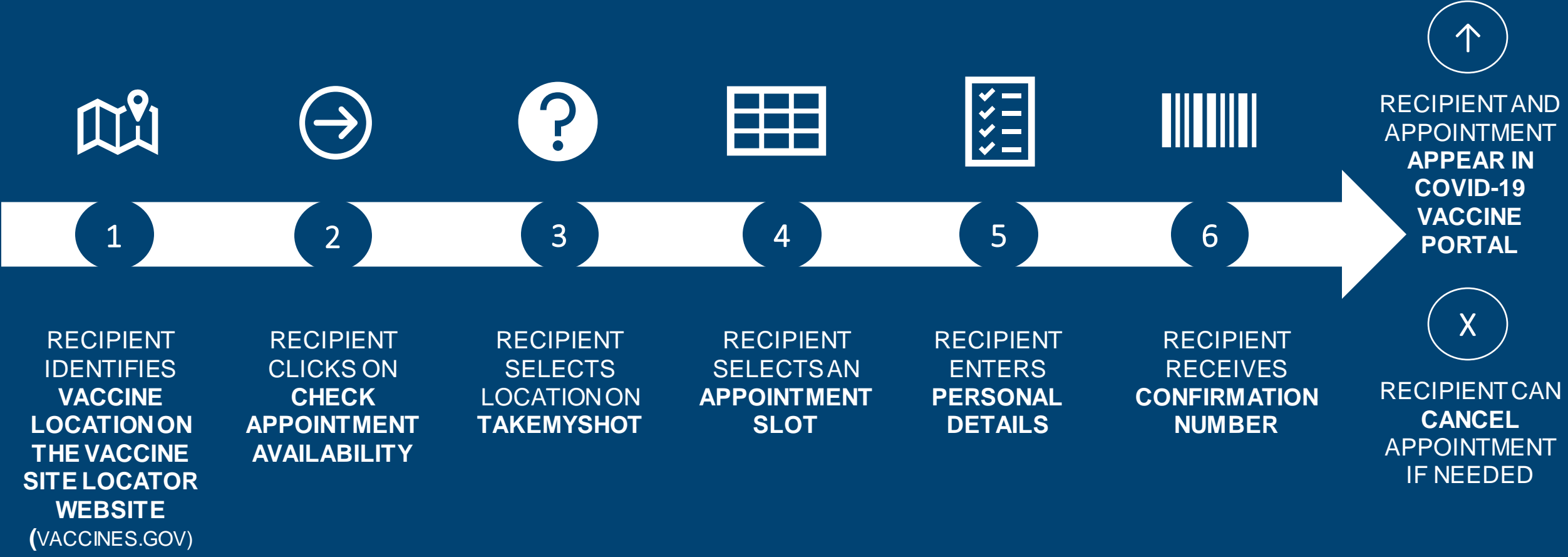
The Availability Report is updated once daily.

- The **AVAILABILITY REPORT** shows the number of appointment slots as defined by the location's availability and the number of appointment slots booked for first and second-dose appointments.
- The availability schedule is shared by first and second-dose appointments.
- Lastly, review the remaining quantity of appointment slots.

You may find that you need to increase availability to allow additional appointments to be booked. See the *Set Weekly Location Schedule for Dose 1, Dose 2, and Additional Dose/Booster Appointments* section for more information on editing the default availability schedule. See the *Create Non-Regular Availability* section for more information on editing the availability schedule for temporarily editing the availability schedule.

# Scheduling from the Perspective of a Recipient

Below are the various activities included in the appointment scheduling process from the perspective of a Recipient.



# Appendix

# CVMS Steps For Providers






---

- ✓ Step 1 - Register your organization
- ✓ Step 2 - Register each vaccine location and all prescribing providers who will administer vaccine
- ✓ Step 3 - Obtain NCID credentials
- ✓ Step 4 - Create user accounts for your organization's CVMS users
- ✓ Step 5 - Navigate the CVMS Provider Portal
- ✓ Step 6 - Receive and manage vaccine inventories
- ✓ Step 7 - Add locations to the find a vaccine location website
- ✓ Step 8 - Invite recipients to register in the COVID-19 Vaccine Portal
- ✓ Step 9 - Invite recipients to self-schedule their appointments (optional)
- ☐ Step 10 - Check-in recipients and document vaccination

# Additional Notes

---

## Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- **\* Asterisks** are used to denote required information.
-  A Toggle can be clicked to see selectable options.
-  A Pen can be clicked to make edits to the field.
-   Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
-  A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

## Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more information on supported browsers, see [https://help.salesforce.com/articleView?id=getstart\\_browsers\\_sfx.htm&type=5](https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5)
- Note: Internet Explorer and Edge (non-Chromium) browsers are not supported.

# User Guide Change Log

| Version | Date of Change | Changes Made  | Author                                      |
|---------|----------------|---|---|
| 1       | 03/12/2021     | <ul style="list-style-type: none"> <li>Initial document</li> </ul>  | Kevin Kauffman, Kechia Scott, Kristin Clark |
| 2       | 03/25/2021     | <ul style="list-style-type: none"> <li>Added tip about Display Vaccine Site Locator field</li> </ul>  | Kristin Clark                               |
| 3       | 04/01/2021     | <ul style="list-style-type: none"> <li>Replaced screen shots to reflect Vaccine Brand field</li> </ul>  | Kristin Clark                               |
| 4       | 04/06/2021     | <ul style="list-style-type: none"> <li>Updated Recipient Scheduling process</li> </ul>  | Tabitha McKelvy                             |
| 5       | 04/16/2021     | <ul style="list-style-type: none"> <li>Added updated enable scheduling process</li> <li>Updated Display on Vaccine Site Locator to dropdown</li> <li>Added guidance for Location Setting field on location record</li> <li>Updated guidance on non-regular closures</li> </ul>  | Kevin Kauffman                              |
| 6       | 05/14/2021     | <ul style="list-style-type: none"> <li>Added non-regular schedule availability support</li> <li>Included scheduling reports</li> </ul>  | Kevin Kauffman                              |
| 7       | 06/22/2021     | <ul style="list-style-type: none"> <li>Updated Vaccine Site Locator to be the CDC website, Vaccines.gov</li> <li>Updated steps for new location creation vaccine supply to edit</li> </ul>  | Kevin Kauffman                              |
| 8       | 06/28/2021     | <ul style="list-style-type: none"> <li>Updated location record screenshots with new field order</li> <li>Updated recipient appointment scheduling flow</li> </ul>   | Kevin Kauffman                              |
| 9       | 07/27/2021     | <ul style="list-style-type: none"> <li>New user guide format</li> </ul>   | Vanessa Kemajou                             |
| 10      | 08/26/2021     | <ul style="list-style-type: none"> <li>Help Desk References Updated</li> </ul>  | Kaitlin Gates                               |
| 11      | 09/20/2021     | <ul style="list-style-type: none"> <li>Help Desk hours updated</li> <li>Screenshots updated throughout to reflect current tool bar</li> <li>All references to 2<sup>nd</sup> dose now also include additional dose/booster</li> <li>24-27: Updated to include references to additional dose/booster</li> <li>28-29: Added slides to discuss setting number of appointments for additional dose/booster</li> <li>32: Now linked to Step 10 User Guide</li> <li>46: Updated to include current reports</li> <li>47: Explained how to edit location if required</li> </ul> | Kaitlin Gates,<br>Darrell Lee               |